

**What do you call the people
you serve?**

YOU MAY CALL THEM

- Customer
- Family
- Consumer
- Client
- Citizen
- Patron

What's important is not what you call them but how staff treats them!

1993 GPRA

The word **customer** first appears in the 1993 Government Performance and Results Act (GPRA) that requires federal agencies and those they fund to have an outcome framework

THE GOAL

To develop a basic framework of a customer service policy and procedures guide for your LSP

- Who is my customer?
- Why is customer feedback/analysis important?
- What are the elements of a customer success plan

IHCDA SURVEY QUESTION

Which LSPs currently have policy and procedures related to customer service?

TYPES OF CUSTOMERS

There are two types of Customers:

1. PRIMARY

- The person whose life is changed through the services they receive and the work you do

2. SECONDARY

- The volunteers, members, partners, funders, referral sources, LSP employees and others who must be satisfied

CUSTOMER EXPERIENCE

Are customers satisfied with their experience with your organization?

How do we know?

CUSTOMER EXPERIENCE

Highlights of group discussion

Feedback Methods (print & electronic)

Surveys

Comment Cards

Focus groups

letters

Facebook/twitter

Questionnaires

Interviews

Phone calls

Contact us form on website

Customer Service Review (mystery caller)

Analysis Methods of Evaluated Data

- Spreadsheets
- Charts/Graphs
- Annual Reports

ROOT CAUSE ANALYSIS EXERCISE

The Problem: **Customer Complaints**

- LSP is getting more customer phone calls with complaints lately. Your agency wants to know the cause so you can identify and implement countermeasures to fix the complaints.

Group Assignment:

- Rank the most common reasons for customer complaints
- Brainstorm potential interventions that might reduce these complaints

IMPACTING THE CUSTOMER EXPERIENCE

A **Customer Service Guide** is an invaluable tool that LSPs can create and use to effect the many different areas of the customer experience for both the primary and secondary customer

It is your organization's guide to top-quality service

ELEMENTS OF A CUSTOMER SERVICE GUIDE

What should be in a Customer Service Guide?

It should outline the process in which all customers interact with your organization and employees

- What is their first interaction with staff?
 - Walk through the customer experience and try to duplicate it step-by-step in your guide

GROUP ASSIGNMENT

**What topics
should be covered in a
Customer Service
Guide?**

ELEMENTS OF A CUSTOMER SERVICE GUIDE

Highlights of group discussion

- LSP Mission Statement
- How to greet customers (phone and in person)
- How to talk to customers
- How to answer customer questions
- How to effectively deal with irritated customers (diffusing and not escalating the situation)

ELEMENTS OF A CUSTOMER SERVICE GUIDE

Highlights of group discussion-continued

- Customer complaint steps
- Frequently Asked Questions (FAQ)
- Agency information (i.e. hours of operations)
- Agency programs/services description
- Community resources/ referral system

ELEMENTS OF A CUSTOMER SERVICE GUIDE

Highlights of group discussion-continued

- Acceptable wait times (phone and in person)
- How to help customers with special needs or with disabilities
- Ways to gather customer feedback (including how often)
- How to evaluate customer feedback results

ELEMENTS OF A CUSTOMER SERVICE GUIDE

Highlights of group discussion-continued

- Reporting customer service information to upper management/ governing board
- Employee training
- Special Situations
 - crisis appointments
 - weekend emergency procedures

“Your success ultimately depends on what you have contributed to the success of your customers”

Philip Kotler

IHCDA MARKETING & COMMUNICATIONS

- Who we are
- What we do – telling the story

OUR APPROACH TO CUSTOMER SERVICE

- IHEDA mission:
- *To provide housing opportunities, promote self-sufficiency and strengthen communities*
- Our goal: to integrate our mission into our customer service approach
- Be a “connector”
- Information should be
 - Practical
 - Useful
 - Accessible
- Mining for gold: make the most out of your customer interaction

WORKING TOGETHER TO TELL OUR STORY

- Be proactive – let us know about customer service issues before a complaint becomes a news story
- You don't have to be perfect: we understand that people aren't always happy with your answers.
- Communicate, communicate, communicate
- Opportunities for success: how can we help?
 - Tell the story!
 - Social media
 - Newsletters
 - Press releases